What is Incidence of Purchase?

Incidence of Purchase is the number of purchases of a product made by every 100 shoppers going through a "typical" supermarket.

$$\text{Incidence of Purchase} = \frac{\text{Number of product purchases}}{\text{Number of shoppers}} \times 100$$

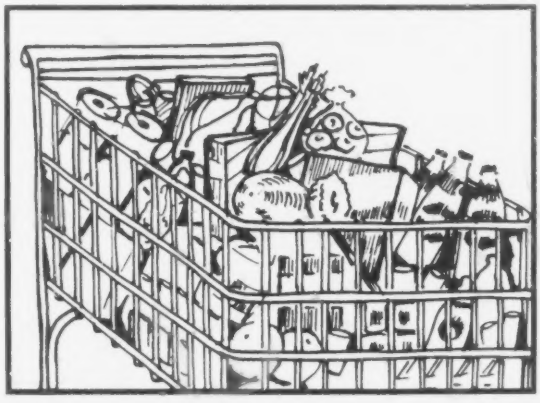
Incidence of Purchase is related to product movement but it is not a direct reflection of product volume since package size, and multiple purchases are not reflected in this formula.

On what is Incidence of Purchase based?

The POPAI/DuPont Consumer Buying Habits Study, a national survey covering 74 product categories sold in supermarkets, provided data for the analysis of Incidence of Purchase. The figures are based on 53,000 purchases made by 4,000 shoppers in 203 representative supermarkets distributed nationally according to a validated pattern based on U. S. Government census figures. It is the only national study of consumers which records their purchases in this detail.

How can you use Incidence of Purchase?

This brochure contains national Incidence of Purchase figures. The information helps the marketing community identify important segments of the consuming public. It provides guidelines for tailoring in-store promotions and advertising to those consumers *who buy the most* (or least) or any specific product.



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Special Report

POPAI/DuPont Consumer Buying Habits Study

SPECIFICALLY PLANNED	GENERALLY PLANNED	+ SUBSTITUTE	+ UNPLANNED	= STORE DECISIONS
35.2	14.8	3.0	47.0	64.8

(Total Study Average)

Store Decisions... 2/3 of Every Dollar Spent In The Marketplace

SPECIAL REPORT

The POPAI/DuPont study found fewer large families, generally smaller households, and higher incomes

☐ In 1965, the E. I. DuPont company released the results of a study designed to monitor and report on the consumer's buying habits at the supermarket. The study was the seventh for DuPont, the first having been conducted in 1935.

Last year, fully 12 years after the 1965 study, the Point-of-Purchase Advertising Institute and DuPont collaborated on yet another consumer buying habits study. It is the results of that study, and the comparisons between the 1977 study and the one that preceded it, that will be reported here.

First, some preliminaries. The study, financed by some 50 national advertisers, was conducted by recording 53,000 purchases made by 4,000 shoppers at 200 supermarkets throughout the country then comparing these purchases with what the consumers who made them said they would buy as they entered the super-

The POPAI/DuPont study: 1965 vs. 1977

	1965	1977
Avg. item price	$ 0.62	$ 1.30
Avg. no. of items purchased	13.30	13.60
Avg. purchase	$ 8.01	$17.68
Use of shopping list	37.40%	40.00%
Use of newspaper ads	32.30%	38.30%
Two or fewer trips a week	49.50%	58.30%
% of purchases specifically planned	31.10	35.20
% of purchases generally planned	17.20	14.80
Substitute purchases	1.80%	3.20%
Unplanned purchases	49.90%	46.80%
Total store decisions (Includes generally planned, substitute and unplanned purchases)	68.90%	64.80%

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Classification of purchases, 1977 POPAI/DuPont consumer buying habits study

Product Purchased	Type of buying decision: % Specifically planned	% Generally planned	+ % Substitute total	+ % Unplanned	= 1977 % Total Store decision	1965 % Total Store decision
Baked foods						
Baking mixes	25.6	9.3	2.9	62.2	74.4	78.3
Baking needs except sugar and mixes	36.9	17.9	2.3	42.9	63.1	70.1
Bread, white	44.0	23.5	5.2	27.3	56.0	57.2
Bread other, croutons	36.9	17.2	6.0	37.9	63.1	75.6
Cakes and pies	15.7	11.9	2.4	70.0	84.3	84.4
Donuts, sweet rolls, other pastry, fresh	18.8	10.0	2.2	69.0	81.2	87.0
Rolls, buns, muffins, not sweet, fresh	22.9	16.3	4.2	56.6	77.1	80.0
Beverages						
Coffee, instant and regular	56.3	7.4	2.9	33.4	43.7	48.5
Tea and chocolate beverages, beverage mixes	33.8	5.5	4.2	56.5	66.2	65.3
Candy, crackers, cookies, snacks						
Candy and gum	15.2	9.6	1.7	73.5	84.8	89.8
Cookies	15.3	17.2	2.4	65.1	84.7	89.8
Crackers	27.5	12.7	2.7	57.1	72.5	74.8
Nuts and dried fruits	17.6	22.9	2.8	56.7	82.4	87.5
Snacks and gourmet foods	20.2	10.0	2.1	67.7	79.8	80.3
Dairy						
Butter, margarine	37.9	15.2	7.0	39.9	62.1	63.4
Buttermilk, cream, ref. substitutes, yogurt, and sour cream	33.4	20.4	4.9	41.3	66.6	69.9
Cheese, cheesespreads, spreads	29.7	18.3	2.6	49.4	70.3	78.5
Milk and eggs	53.2	23.9	2.8	20.1	46.8	45.1
Refrigerated doughs, other dairy products	24.0	12.0	4.0	60.0	76.0	80.3
Deli						
Bacon	28.5	22.6	4.0	44.9	71.5	74.9
Ham and lunch meat	28.4	22.9	2.2	46.5	71.6	69.7
Hotdogs	25.5	16.9	5.2	52.4	74.5	80.1
Sausage and scrapple	25.3	15.9	3.1	55.7	74.7	81.5
Desserts						
Desserts—gelatin and puddings	31.8	11.6	2.0	54.6	68.2	82.9
Frozen foods						
Frozen baked goods, dough	15.8	9.0	3.7	71.5	84.2	86.6
Frozen dinners, entrees, other frozen foods	22.8	11.3	2.8	63.1	77.2	85.6
Frozen fruit juice concentrates	33.2	15.7	4.7	46.4	66.8	75.8
Frozen fruit, vegetables	21.7	17.9	5.3	55.1	78.3	85.4
Ice cream, ice milk	27.9	16.7	2.2	53.2	72.1	79.6

Classification of purchases, 1977 POPAI/DuPont consumer buying habits study

Product Purchased	Type of buying decision: % Specifically planned	% Generally planned +	% Substitute total +	% Unplanned =	1977 % Total store decision	1965 % Total store decision
General Merchandise						
Alcoholic beverages	33.0	13.3	2.2	51.5	67.0	69.3
Housewares, hardware	18.5	13.6	0.3	67.6	81.5	83.8
Oral hygiene, remedies and vitamins	42.7	3.9	2.1	51.3	57.3	64.6
Other health and beauty aids	27.9	8.6	2.3	61.2	72.1	71.3
Tobacco products and accessories	43.3	5.8	0.4	50.5	56.7	61.0
Pet foods and supplies	44.3	13.8	3.9	38.0	55.7	66.0
Other nonfoods	14.9	7.8	0.4	76.9	85.1	85.4
Groceries						
Baby foods and baby care products	39.0	27.2	2.9	30.9	61.0	80.0
Baking mixes	25.6	9.3	2.9	62.2	74.4	78.3
Baking needs except sugar and mixes	36.9	17.9	2.3	42.9	63.1	70.1
Canned and bottled fruits	23.0	17.0	4.6	55.4	77.0	80.9
Canned and bottled fruit juices and drinks	31.3	11.8	4.7	52.2	68.7	77.5
Canned and bottled vegetable juices	35.2	9.0	3.4	52.4	64.8	75.9
Canned beans, tomatoes, paste, puree, sauce	27.0	12.5	4.1	56.4	73.0	74.6
Canned fresh vegetables except tomatoes	27.3	19.7	4.6	48.4	72.7	80.8
Canned entrees, gravy, gravy mixes, bouillon	22.6	10.5	3.9	63.0	77.4	80.8
Canned soups and mixes	31.8	13.3	2.3	52.6	68.2	75.5
Catsup, chili, barbeque, steak, etc., sauces	30.2	8.7	3.4	57.7	69.8	73.3
Cold cereal	32.4	19.8	2.9	44.9	67.6	73.6
Entree mixes, meat extenders	24.4	7.3	2.0	66.3	75.6	85.3
Ethnic, diet foods	16.7	15.1	2.3	65.9	83.3	80.6
Evaporated, condensed, powdered milk, coffee creamers	43.6	12.1	5.5	38.8	56.4	58.1
Herbs and spices	18.5	23.3	4.1	54.1	81.5	82.4
Hot cereal and other breakfast foods	30.2	11.1	1.0	57.7	69.8	66.7
Mayonnaise and salad dressings	36.9	6.8	3.7	52.6	63.1	65.5
Mustard and relishes, olives, pickles, vinegar	18.3	17.4	2.7	60.6	80.7	82.8
Oils and shortenings	43.8	8.1	3.2	44.9	56.2	57.5
Pastas, cereal grains	26.9	17.5	1.6	54.0	73.1	76.7
Soda, bottled or canned	44.1	8.0	3.9	44.0	55.9	61.3
Spreads	33.0	12.1	3.8	51.1	67.0	75.9
Sugar and sugar substitutes	38.6	20.5	2.2	38.7	61.4	69.2

In 1965, 24.2% of the shoppers shopped once a week; today, 28.6% shop once weekly

market. The intent was to determine what percentage of total purchases was planned before the shopper entered the store, and what percentage was influenced by something that happened after entering the store.

More specifically, the purchases were put into four categories as follows:

- Specifically planned—those purchases where the consumer had a brand or item in mind before she entered the store—and proceeded to buy that brand or item. In unbranded merchandise, such as produce or meat, an item mentioned, then purchased, constituted a purchase that was specifically planned.
- Planned in general—a classification where the shopper had a particular product or product category in mind, but no specific brand. In this instance, the shopper appears willing to be influenced by such store variables as price, displays, new products, etc.
- Substitute—where the shopper changed her mind and did not buy the item she had specifically planned to buy. She might have switched brands or products.
- Purchased without any previous plan—items the shopper did not intend to buy upon entering the store. In other words, impulse purchases.

Against that background, here are the findings uncovered in the 1977 POPAI/DuPont study:

- Between 1965 and 1977, the specifically planned category increased substantially—from 31.1% of all purchases in 1965 to 35.2% in 1977. In other words, shoppers are planning on purchasing more of the items they buy before going to the store.
- Still, the overwhelming percentage of purchase decisions—64.8%

ALL PRODUCTS AVERAGE BUYING DECISIONS

	Specifically Planned	Generally Planned	+ Substitute	+ Unplanned	= Store Decisions
1965	31.1	17.2	1.8	49.9	68.9
1977	35.2	14.8	3.0	47.0	64.8

The changing family

If the consumer's purchasing patterns have changed somewhat during the past 12 years, the makeup of her family has changed a great deal. Some examples of those changes:

- In 1965, 50% of the consumers shopped for households of three people or less. Today, 61.7% of the shoppers have families of three members or less. Put another way, there are more small families, more single-member households.
- Over the same period the number of large families has also changed. In 1965, 25% of the shoppers represented households of five people or more. Today, just 18.8% of the shoppers are members of five-person households.
- If families are shrinking, family incomes are growing. In 1965, 25% of the shoppers represented families with incomes of over $7,500. In 1977, 75% of the shoppers represented families with incomes of more than $7,500. Reasons for the higher incomes: inflation, and the increase in working women.

The study, latest in a series, measured consumer shopping habits in supers—and found many changes

—continues to be made at the store.

• There have been, however, significant changes in buying patterns at the store. For one thing, the "generally planned" category dropped from 17.2% in 1965 to 14.8% in 1977. Conclusion: Shoppers are making more hard-and-fast brand and item decisions be-

Classification of purchases, 1977 POPAI/DuPont consumer buying habits study

Product Purchased	Type of buying decision: % Specifically planned	% Generally planned	+ % Substitute total	+ % Unplanned	= 1977 % Total Store decision	1965 % Total Store decision
Household Supplies						
Air fresheners, other cleaning supplies, waxes	30.5	7.3	3.1	59.1	69.5	65.6
Bags and wraps	29.0	10.7	4.0	56.3	71.0	75.1
Bath, hand, facial soaps	34.5	7.5	1.3	56.7	65.5	62.2
Bleaches, fabric softeners, other laundry products	44.7	6.8	4.9	43.6	55.3	60.8
Dishwashing products, cleansers, oven cleaners	38.9	8.6	3.7	48.8	61.1	63.5
Facial tissues	40.7	8.9	4.4	46.0	59.3	68.8
Laundry detergents and soaps	56.2	4.6	3.9	35.3	43.8	51.3
Napkins, tablecloths, plates and cups	24.9	20.2	0.8	54.1	75.1	80.6
Paper towels	26.1	17.8	5.3	50.8	73.9	69.7
Toilet tissue	37.3	14.7	4.7	43.3	62.7	72.6
Meat, Poultry, Seafood						
Canned and bottled meat, poultry and fish products	27.7	11.3	3.6	57.4	72.3	77.3
Meat, fresh or frozen	38.8	27.5	2.8	30.9	61.2	58.3
Poultry, fresh, frozen or processed	46.0	19.6	3.9	30.5	54.0	57.5
Deli and seafood	26.1	12.3	1.9	59.7	73.9	66.6
Produce						
Fresh fruit	50.6	9.4	1.0	39.0	49.4	59.6
Fresh vegetables	52.8	8.1	0.6	38.5	47.2	55.2
ALL PRODUCTS	35.2	14.8	3.0	47.0	64.8	68.9

Changing buying patterns

Consumers' supermarket shopping patterns are changing—not only in the extent and effect of in-store influences on purchases, but in how, why and on what shoppers spend their food money. Some examples:

- In 1965, the average supermarket product cost 62¢. Today, it costs $1.30.
- Interestingly, though the average cost of an item has doubled in 12 years, shoppers are buying the same number of items today as they did in 1965. Specifically, in 1965, shoppers purchased an average of 13.3 items. In 1977, the average purchase was 13.6 items.
- As a result, the average total purchase jumped from $8.01 in 1965 to $17.68 in 1977—a 121% increase.
- During the 12-year period between the two surveys, the consumer price index for food increased 97%, an indication that consumers are buying more expensive items than they were in 1965. Equally significant, POPAI/DuPont estimates that as much as 24% of the grocery bill consists of items that did not exist in 1965—at least not in the supermarket. To a large extent, this refers to the general merchandise assortments that supermarkets have added, expanded, increased and refined in this decade.
- More consumers are using shopping lists than was the case 12 years ago—reversing a trend that had seen their use decline in past POPAI/DuPont surveys. In 1965, 37.4% of the shoppers used a shopping list. Last year, that figure jumped to 40%.
- The utilization of newspaper ads is also increasing. In 1965, the use of newspaper ads had stabilized to some degree—as 32.3% of the surveyed shoppers said they used such ads. In 1977, this percentage had jumped to 38.3%—an indication that more consumers plan their shopping trips in advance than was the case 12 years ago.
- Perhaps most significant of all the findings is the fact that the consumer's shopping frequency appears to be changing. In 1965, 24.2% shopped once a week; 25.3% shopped twice a week; 22.1% shopped three times a week; 9.7% four times weekly, and 5.9% five times weekly. In 1977, 28.6% of the consumers shopped once a week, a significant increase. Similarly, 29.7% of the consumers shopped twice a week, another hefty gain. Conversely, those shoppers shopping three or more times weekly have declined—with 19.7% shopping three times weekly; 7.9% four times a week; 3.4% five times weekly. Thus, in 1965, 49% of the shoppers shopped no more often than twice weekly. In 1977, 58% shopped no more than twice a week.

To summarize, today's shopper is shopping less frequently, but spending more on each visit to the supermarket. She is planning more of the items she buys before entering the store, relying more heavily on both shopping lists and newspaper ads. However, if the consumer is making more of her shopping decisions at home than she did eight years ago, she still makes almost two-thirds of those decisions at the store—and remains largely a product of such in-store influences as price, new products, and point-of-purchase displays. In other words, the customer is still largely influenced by what she sees in the store—and how she views what she sees.

- Substitute purchases, on the other hand, increased—from 1.8% in 1965 to 3.2% in 1977. In other words, shoppers changed their mind at the store more frequently in 1977—and judging from past survey results, more frequently than they have in many years.
- The "unplanned purchase" frequency declined substantially from the 50% level at which it had remained for many years. In 1965, the unplanned figure was 49.9%. In 1977, the figure dropped to 47.0%. The drop is a significant one—and means that shoppers are impulse-buying fewer items these days.
- As a result of these consumer buying pattern shifts, the total percentage of purchases made as a result of store decisions—that is, the total of generally planned, substitute and unplanned purchases—dipped to 64.8% of all purchases. However, though lower than the 68.9% recorded in 1965, store decisions still account for almost two of every three purchases made. ■

SPECIAL REPORT

The 8th DuPont consumer buying habits study

Another of a continuing series (since 1935) of consumer buying habits originated by DuPont, this study continues a tradition of providing significant information to the supermarket industry and those serving it. It is based on sampling and survey techniques which present an accurate picture of the supermarket shopper's purchasing behavior on a typical shopping trip.

HOW THE SURVEY WAS MADE

THE SURVEY—conducted by IDE ASSOCIATES, INC., Philadelphia, Pa., in conjunction with the Point-of-Purchase Advertising Institute and the Marketing Research Dept., Plastic Products and Resins Dept., E. I. DuPont de Nemours & Co.
THE SAMPLE—8,000 shoppers in 200 representative supermarkets distributed nationally according to a validated pattern based on U.S. government census figures. Shopping days checked were Sunday through Saturday, including all shopping hours. Some 53,000 purchases were recorded.
METHOD
1. As shoppers entered the store, they were asked by especially trained interviewers what they intended to buy. All items (written or thought about) were recorded. For each item the shopper planned to buy, she was asked what brand and kind she had in mind. To avoid influencing behavior, shoppers were not told their purchases would be checked when they left the store.
2. After shoppers had completed their buying, interviewers approached them a second time and, on the same check list, entered actual purchases made.

Nearly ⅔ of every dollar spent results from some decision made in the store

ALL PRODUCTS AVERAGE
Per cent of purchases

Specifically planned	Generally planned +	Substitute +	Unplanned =	Store decisions
35.2	14.8	3.0	47.0	64.8

Classification of purchases

- **Specifically planned and purchased**
A specific brand or item purchased as planned, like OK rye bread, ABC caramels, lettuce or steak.
- **Planned in a general way and purchased**
A general classification like a loaf of bread, a vegetable or some meat.
- **Purchased as a substitute**
A change from a specifically or generally planned item.
- **Purchased without any previous plan**
An item bought which the shopper did not have in mind upon entering the store. Unplanned purchases are often referred to as "impulse" purchases.

Incidence of purchase: advertising and displays

Product	Brand Average Purchase	No adv. and no display	No adv. and display	Adv. and no display	Adv. and display
Baking mixes	1.77	1.36	2.02	3.02	3.99
Oil and shortenings	0.96	0.78	1.57	1.82	5.13
Sugar and sugar substitutes	2.24	1.85	2.15	5.48	11.07
Bread, other, croutons	3.00	2.51	3.71	4.85	5.77
Bread, white	6.33	4.59	18.61	17.29	21.56
Baking needs	3.37	2.06	3.79	5.61	5.70
Donuts, sweet rolls, other pastry, fresh	2.75	2.37	2.61	3.66	6.80

Bakery foods & ingredients: puffing up sales with in-store aids

☐ With the new wave of in-store bakeries, conventional wisdom would indicate that packaged baked goods on the self-service shelf will be ignored by customers. But conventional wisdom can be tossed out the window, because although in-store bakery units grew by 16.5% last year, shoppers still showed a strong interest in baking at home.

This means that the supermarket shopper is interested in fresh-tasting baked goods, whether she buys them away from home or makes them in her kitchen, and figures from the Consumer Buying Habits Study show that nearly all baked goods and bakery ingredients are highly sensitive to in-store selling influences.

Baking mixes. The study shows that baking mixes—biscuits, muffins, pancakes, cakes, cookies and pie crusts—are generally not included in a shopping plan. Only 25.7% of the baking mix purchases are specifically planned, and 62.1% are unplanned, indicating that some in-store influence persuades the shopper to buy a baking mix. Interestingly, very little substitution takes place inside the store (4.8%) and only 9.3% of purchases are generally planned before the supermarket trip.

The incidence of purchase (IP) for the category is 14.13 per 100 shoppers, but the eye-catching statistic is the 8.80 IP for cake and cookie mixes, an indication that most shoppers bake for their sweet tooth—or somebody else's.

Baking mixes are sensitive to promotional aids, especially pie crust mixes, demonstrating that more merchandising aids should be used. While displays boost the purchase rate of this category some 49%, advertising pushes it up 122%. Advertising and display bolsters IP by 193%. Pie crust mixes

Incidence of purchase: all shoppers

Product	All shoppers
Baking mixes	**14.13**
Biscuit, muffin, pancake mixes	3.19
Cake & cookie mixes	8.80
Private label	0.33
Pie crust mix	0.82
Other mixes	1.31

Buying decisions

Product	% Total purchase	Specifically planned	Generally planned	+ Substitute brand	Substitute product	+ Unplanned	= Store decision
Baking mixes	**100.0**	**25.7**	**9.3**	**1.1**	**1.8**	**62.1**	**70.3**
Biscuit, muffin, pancake mixes	100.0	21.8	4.0	2.4	2.4	69.4	78.2
Cake & cookie mixes	100.0	28.7	11.1	0.6	1.8	57.9	71.3
Private label	100.0	23.1	15.4			61.5	76.9
Pie crust mix	100.0	28.1	12.5			59.4	71.9
Other mixes	100.0	13.7	7.8	2.0	2.0	74.5	86.3

Incidence of purchase: advertising and displays

Product	Brand Average Purchase	No adv. & no display	No adv. & display	Adv. & no display	Adv. & display
Baking mixes	**1.77**	**1.36**	**2.02**	**3.02**	**3.99**
Biscuit, muffin, pancake mixes	3.19	3.20	4.11	3.02	2.50
Cake & cookie mixes	1.76	1.36	1.72	3.43	4.00
Private label	0.33	0.32		0.71	
Pie crust mix	0.82	0.41	1.45	0.43	6.25
Other mixes	1.31	1.06	1.85	3.07	

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Buying decisions

Product	% Total purchase	Specifically planned	Generally planned	+ Substitute brand	Substitute product	+ Unplanned	= Store decision
Baking needs	**100.0**	**37.0**	**17.9**	**2.1**	**0.2**	**42.8**	**63.0**
Baking chocolate, bits	100.0	37.9	10.0	4.3		47.9	62.1
Baking powder	100.0	28.6	20.4			51.0	71.4
Extracts & flavorings	100.0	24.6	26.3	1.8		47.4	75.4
Flour	100.0	52.1	16.8	2.7		28.4	47.9
Pie fillings other than puddings	100.0	31.7	13.4	1.2		53.7	68.3
Salt & salt substitutes	100.0	34.2	25.4	1.8		38.6	65.8
Baking needs, other	100.0	22.5	19.8	0.5	1.1	56.0	77.5

behave differently from the rest of the mixes: Advertising has little effect, but displays nearly double the purchase rate. Combining the two promotional aids, IP is boosted nearly seven times.

Coupons, store circulars and retail newspaper ads also have significant effects on cake mixes. A store ad used in conjunction with a coupon will push the average IP up sixfold. A store ad by itself will boost the average purchase rate for the category by 87%. In comparison, a manufacturer's mail coupon will double the IP, while manufacturer's newspaper coupons will only jump the purchase rate a comparatively meager 33%.

Other figures show that the purchase rate of baking mixes is strongest in the under-20 age group (17.28 per 100) and in the 30-39-year-old category (17.30), compared to the 14.13 IP for the category. These figures can be attributed to young girls learning their way around the kitchen and homemakers with growing families practicing what they've learned.

The purchase rate by income group shows that the highest IP is in the $4,000-$6,999 group (15.25). The figures for the other income levels are relatively stable, hovering between 13.25 and 14.74.

Analysis of shopping group composition also reveals some telling statistics. The presence of a child tends to shoot the purchase

Incidence of purchase: all shoppers

Product	All shoppers
Baking needs	**23.58**
Baking chocolate, bits	3.60
Baking powder	1.26
Extracts & flavorings	1.47
Flour	7.52
Pie fillings other than puddings	2.11
Salt & salt substitutes	2.93
Baking needs, other	4.68

Incidence of purchase: advertising and displays

Product	Brand Average Purchase	No adv. & no display	No adv. & display	Adv. & no display	Adv. & display
Baking needs	**3.37**	**2.06**	**3.79**	**5.61**	**5.70**
Baking chocolate, bits	3.60	2.69	2.89	4.33	3.29
Baking powder	1.26	1.26		1.61	
Extracts & flavorings	1.47	1.35	9.99	1.37	14.58
Flour	7.52	4.50	10.57	8.36	8.70
Pie fillings other than puddings	2.11	1.24	2.46	2.98	5.06
Salt & salt substitutes	2.93	2.74	0.86	5.14	
Baking needs, other	4.68	3.45	5.78	4.85	5.01